UNIT4
In business for people

Unit4 Feature Services

Cloud Service Description

VERSION 2025Q1.1

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Content

1. Introduction

Unit4 Feature Services are providing functional capabilities to Unit4 solutions. Feature Services have a micro service-based architecture where different Task Focused Applications run independent of each other. These Services are Multi-Tenant, shared Services.

Unit4 provides a complete technically managed solution for Unit4 Feature Services deployed in the public cloud. This end-to-end Service includes infrastructure, hardware, system software, monitoring, management and maintenance, disaster recovery and Service updates.

Unit4 Feature Services runs on Microsoft Azure, leveraging Microsoft Azure's scale and experience of running highly secure and compliant cloud Services around the globe. Microsoft Azure certifications provide the building blocks for Unit4's compliance efforts. Unit4 delivers its own ISO 27001, ISO 27017, SOC 1 and SOC 2.

In summary, Unit4 provides the following:

- Fully scalable Feature, in a high availability environment with redundancy
- Security by design
- Continuous monitoring is in place, feeding alerts and continuous improvement
- Application updates
- Production and Non-Production (Preview) Environments with a separate database for Customer Data (if applicable)

2. Data centres & Data residency

Unit4 Feature Services are built upon Microsoft Azure infrastructure and Platform Services. The Unit4 Feature Services are delivered in different geopolitical zones, using a primary and a secondary location in every zone to meet Service level and disaster recovery commitments. The location within each geopolitical zone is at the discretion of Unit4 and can change from time to time. The table below contains details of the geopolitical zones, along with the data centre locations. For more information, see Azure region details: azure.microsoft.com/regions.

Geopolitical zone	Provider	Data Location (Countries/City's/Regions)	Time Zone
EU	Microsoft Azure	Dublin, Ireland and Amsterdam (DR), Netherlands	CET/CEST
USA	Microsoft Azure	Texas and Illinois (DR)	CST/CDT
Canada	Microsoft Azure	Quebec City and Toronto (DR)	EST/EDT
United Kingdom	Microsoft Azure	London and Cardiff (DR)	GMT/BST
Asia	Microsoft Azure	Singapore and Hong Kong (DR)	SGT
Australia	Microsoft Azure	New South Wales and Victoria (DR)	AEDT/AEST
Norway	Microsoft Azure	Oslo and Stavanger (DR)	CET/CEST

Unless agreed otherwise in an Order Form the chosen deployment of the Customer will be as follows:

Customer head quarter residence	Geopolitical zone used
APAC	Asia
Australia/New Zealand	Australia
Canada	Canada
EU	EU
Norway/Sweden/Denmark	Norway
UK	UK
US	US

3. Service model

Unit4 Feature Services are a Multi-Tenant solution embedded in a cloud native / Service based platform. Unit4 Feature Services characteristics are as shown in the table below:

Category	Component	Characteristics
SOLUTION	Updates	Will be applied automatically and periodically
	Environments included	1 Production + 1 Non-Production (Preview)
	Availability guarantee	As per SLA
SERVICES	Updates will commence	Automatically
	On-going technical operations, performance management, maintenance of all infrastructure components, monitoring alert response and issue resolution	Yes
	Disaster Recovery	Yes
	Monitoring program of infrastructure and application	Yes
COMPLIANCE	Compliance certificates and assurance documents – Microsoft Azure	SOC1 Type II (ISAE 3402), SOC2 type II (ISAE 3000), ISO27001, ISO27017[1]

[1] Unit4 Platform Services is compliant with mentioned standards to give Customers confidence that the highest levels of security and data protection practices will be met and allows Customers to streamline their own compliance with regulatory and industry standards. It is Customers responsibility to ensure their own compliance with all applicable standards and compliance obligations. For more details around Information Security please see the Unit4 Information Security Policy, which is available at www.unit4.com/terms.

4. Environments

Customer's application environments connect to two discrete Unit4 Tenants in Unit4's Feature Services. The application Acceptance and Preview Environments connect to the Feature Preview environment while the application Production Environment connect to the Unit Feature Production environment where Unit4's Production SLA applies.

Customers' Preview environment always contains the latest Updates for the Unit4 Product in use by the Customer.

Unit4 assigns to every Cloud Customer a unique Cloud Customer ID code, which is visible in various elements of the Service (including environments) and is used for Customer identification.

4.1 Production Environments

Only the Unit4 Feature Services Production Environment (PE) is subject to the Service Level Agreement. Customer accessible/visible Feature services follow the general SLA. Feature services unpinning other services that are customer accessible/visible are part of the customer facing services.

4.2 Preview Environment characteristics

1. A Preview (NPE) is not subject to an SLA.
2. For Feature services there is no refresh from PE to NPE.
3. Preview has reduced capacity and cannot be used to resemble PE throughput.
4. Preview is updated as soon as an Update is available.

5. Releases and Updates

There is no concept of a Release to Unit4 Feature Services. All changes to a Unit4 Feature Service are considered an Update of the Service and will be applied automatically and continuously.

Unit4 Feature Service Updates are deployed in a transparent manner and result in no downtime. As such, Unit4 Feature Service Updates can be deployed outside of Planned Maintenance windows. In rare cases when downtime is necessary, the Update will be performed during a Planned Maintenance window.

6. Planned and Unplanned Maintenance

6.1 Planned Maintenance

Planned Maintenance windows are dedicated to applying all the respective changes to the Service provided e.g. solution Updates and infrastructure changes. During Planned Maintenance Production Service may be periodically unavailable. You can find more details on the schedule presented in the table below:

	Planned Maintenance Windows (PMW) *Updates and Infrastructure*
All regions (except Azure US and Azure Canada)	12 per year, **Regular PMW:** From: Sat 5PM To: Sat 11PM UTC* or **Extended PMW**: From: Sat 5PM To: Sun 5AM UTC*
Azure US and Azure Canada regions	12 per year, **Regular PMW:** From: Sun 5AM To: Sun 11AM UTC* or **Extended PMW**: From: Sat 11PM To: Sun 11AM UTC*

*Time of Planned Maintenance Window is a subject of a change (+/- 1h), which is related to winter and summer time adjustments.

Planned Maintenance Windows are subject to change upon reasonable notice. The exact dates of Planned Maintenance Windows are communicated in the cloud section of Unit4 Community4U. By default all Planned Maintenance Windows are regular and take up to 6h, unless they are promoted to extended Planned Maintenance Windows, these take up to 12h.

If actual downtime for scheduled or Planned Maintenance exceeds the time allotted for Planned Maintenance, it is considered part of the calculation for Service Outage. If actual downtime for scheduled or Planned Maintenance is less than time allotted for Planned Maintenance, that time is not applied as a credit to offset any Service Outage time for the month.

Planned Maintenance may also be performed by Unit4, provided that the Customer receives at least eight (8) hours' prior notice. Such maintenance will only take place under unforeseen or exceptional circumstances—similar in nature to emergency or unplanned preventative maintenance—where it is necessary to address a vital or critical issue.

Unit4 will use reasonable endeavours to carry out this maintenance outside of Business Hours in order to minimise disruption to the Customer. In these instances, because Unit4 provides the required eight (8) hours' notice, the activity will not be classified as a Service Outage. This provision ensures that Unit4 is not discouraged from promptly addressing urgent issues outside of the regular Planned Maintenance Window, thereby avoiding unnecessary delays that could arise from concerns about Service Credits.

6.2 Unplanned Preventative Maintenance

Unit4 may carry out Unplanned Preventative Maintenance if there is an urgent requirement to secure the stability or the security of Unit4 SaaS. This action may be taken at the discretion of Unit4 for unforeseen and exceptional circumstances, which require immediate resolution that cannot wait until the next Planned Maintenance window. Unplanned Preventative Maintenance is counted as a Service Outage.

7. Customer permissions and responsibilities

7.1 Customer permissions

Customer has the right to:

1) Monitor PE availability and Service Response Time on an active basis using a third-party monitoring Service. Monitoring acts as a consumer of the Unit4 Feature Services. The Customer must ensure that the monitoring does not interfere with the Unit4 SaaS offering and that Unit4 SaaS security tooling does not block the monitoring Service.
2) Conduct an external security vulnerability scan. Details of the planned scan can be provided to Unit4 at least 30 days in advance of each scan using a Service Request. Failure to so do may result in blocking the customer to use the service while testing.

3) Conduct a security penetration test. Details of the planned test can be provided to Unit4 at least 30 days in advance of each test, using a Service Request. Failure to so do may result in blocking the customer to use the service while testing.

Any activities to prepare, coordinate or manage the above by Unit4 is subject to additional charges.

7.2 Customer responsibilities

Customer has responsibility to configure the customer assets according to the needs of specific Unit4 services such as Resource Request feature service.

8. Data Security

Data in transit

Customer Data in transit is over public networks is protected with TLS 1.2 and higher.

Customer Data at rest

Data at rest is protected using transparent, whole database encryption (e.g. transparent data encryption, and/or whole disk data encryption). Please see the Unit4 Information Security Policy, which is available at www.unit4.com/terms.

Allowlisting

The Feature Services use dynamic IP addresses and are not usable for IP allowlisting (a.k.a. IP filtering). Multi-layer authentication mechanisms based on SSO and M2M accounts are the data security mechanisms of choice.

9. Data backup

Data is backed up with a retention of 7 days to support disaster recovery scenarios. There is no "forgiveness" restore option available. Access to the backups is limited to the Global Cloud Operations engineers in case of Disaster or malfunctioning of hardware/software. Backups are done with the frequency to support RPO on a level of 1 hour.

10. Customer data criticality

There is no critical customer data in Feature services unless specified different in the feature specific appendix.

Appendix A: HMRC

Introduction

Unit4 HMRC Integration (U4HMRC) is a multi-tenant application responsible for acting as a proxy/bridge between Unit4 ERP and His Majesty's Revenue and Customs (HM Revenue and Customs or HMRC) web service. HMRC is a non-ministerial department of the UK Government responsible for the collection of taxes, the payment of some forms of state support and the administration of other regulatory regimes including the national minimum wage.

Unit4 HMRC Integration solution is responsible for:

- Submitting UK Payroll related reports like Full Payment Submission or Employer Payment Summary (which are created in Unit4 ERP) to HMRC web service, checking the submission status and updating the status of the report in Unit4 ERP.
- Retrieving UK Payroll related information from HMRC web service and storing it in Unit4 ERP for further processing and updating payroll data within the ERP.

Azure table storage

The Azure Table storage is used to store all send/retrieve operation data needed together with operation parameters and operation history. It doesn't store any sensitive customer information.

There is only one storage account for all the customers meaning that it's completely multitenant – tenantId belongs to the partitionKey for every table.

Max size for all the tables should not exceed 10GB.

Azure tables overview

- **Operation** – table storing each individual send or retrieve operation requested from U4ERP, also holding status of the operation.
- **OperationParameter** – table storing parameters of each individual operation like for example is it a test or production send/retrieve or should it be send/retrieved from production or test web site.

- **DocumentParameter** – table storing parameters of each individual document belonging to send/retrieve operation like for example correlationId, legal employer etc.
- **DocumentHistory** – table storing history of all documents send together with operationId to which the document belongs to and delivery status
- **Parameter** – table storing tenant related parameters (also related to document type and legal employer) – for example it keeps track of high-water mark

Disaster recovery strategy

DR approach is based around a zone/region failure where core data is replicated to secondary region (Geo-redundant storage) and application compute is redeployed from pipelines.

- No data restoration is required.
- Active send/retrieve operations already running on MPS would be lost
- RPO ~15 Minutes (Allowable window for replication time)
- RTO To be calculated (should be within 10 Minutes until deployment pipeline to secondary region is finished).

Appendix B: Employee Self Service

Introduction

The Employee Self-Service (ESS) offering provides a single, intuitive entry point for employees and managers to access the most commonly used HR and operational services. It is a centralized front door to essential day-to-day tasks, designed to reduce friction and improve user experience across routine employee interactions.

Key Capabilities:

- Absence Requests
- Payslip Access
- Access to Timesheet
- Tasks - absence requests and timesheets approval
- Updating information about address and bank account

Data management

ESS contains separate vertical features service:

- ESS Absences
- ESS Landing Page
- ESS Payslip
- ESS Task Management
- ESS Users

Each of them contain their own data management and storage based on the region where it is deployed. The residency of the data is dependent upon the region in which the Customer's environment is located.

Here are some main considerations:

1. Data refresh - in order to retrieve all the user's data, a mechanism to refresh the data in the ESS Feature Services storage has been implemented.
2. There are two server processes responsible for removing/anonymizing user data:
   - ✓ First, doing it on demand.
   - ✓ Second, doing it based on rules (e.g. removing after 5 years since an employee left the company).

Appendix C: Resource Requests

Introduction

General availability of the service is to be announced.

This service is enhancing Resource planning capabilities to offer great resource management functionality that can easily be integrated with best-of-breed Project planner solutions.

Resource planning entails connecting work with the right people at the right time. It is a collaboration between project managers and resource managers to create a plan that ensures the delivery of successful projects while making sure tasks are completed on schedule and maintaining high utilisation in your workforce.

Project resourcing involves managing a range of variables, including employee availability, capacity, upcoming commitments, and planned absences. Resource planning simplifies this process by consolidating all relevant information into a single platform, eliminating the need for scattered tools such as spreadsheets, calendar applications, emails, or other organisational systems.

Data management

Resource Planning Service is a true vertical, domain based independent micro-service with its own purpose-built data storage. The residency of the data is dependent on the region in which the Customer's environment is located.

The main considerations for disaster recovery strategy: in case of a disaster, the data will be recovered from secondary region where a backup will be stored. Service database will be replicated following the same policy as ERPx.

Appendix D: Timesheet Web App

Introduction

This Service is improving user's experience in time reporting. It is a web application that can be used on any device. The time entries are presented in list for easy navigation on both desktop and mobile. The app is available in ESS (Employee Self-Service) and also as menu option within ERPx.

Please note that Timesheets Web App does not fully comply with the WCAG standards. For now, the recommended choice for users requiring assistive technology is the **Timesheet Standard (TTS025)** window in ERPx.

Data management

The app is "just another frontend" for the Timesheets module in ERPx Core. The project and work schedule details are fetched from ERPx using Object APIs and then the app feeds the timesheet data back into ERPx via the Timesheets Public API.

To use this app, the user needs to have access to the following reporting objects:

- Additional cost/income elements
- Assignments (if you want to enable Your planned time)
- Connection per activity
- Connection per project
- Connection per work order
- Customers
- Outstanding timesheets
- Periods
- Personal work schedule
- Projects
- Resources
- System parameters
- Time codes
- Timesheets
- Users
- Workflow tasks

Also access to the following Public API must be granted: **Timesheets**

Additionally, the Timesheet module needs to be correctly configured in ERPx, and Users work schedule for the current period needs to have been generated.

Appendix E: Tax reporting

Introduction

Avalara Tax Reporting is a service integrated into ERPx that facilitates the management of transactional tax reporting. It provides a prebuilt connection to the Avalara VAT Reporting application, a specialized solution designed to support international VAT and transactional tax obligations.

As tax compliance regulations evolve, particularly with the shift from paper-based to electronic VAT reporting in many countries, automated solutions are becoming increasingly necessary. This integration enables ERPx users to generate tax reporting documents directly in Avalara's platform, where compliant VAT returns can be filed across all supported countries. This removes the need to build country-specific reports manually within ERPx.

To use this service, an active Avalara account is required. Users must configure the start date for reporting tax transactions via Avalara in the Company Information window and enter their Avalara credentials in the designated section under the General Ledger menu (Taxes). Once configured, tax transactions will be automatically interfaced into Avalara, where they can be submitted to the relevant tax authorities.

Data management

Tax integration holds no data of its own, it is only a connector between ERPx and Avalara VAT reporting. It could happen that for some reason tax transactions are not correctly transferred to Avalara VAT reporting. In that case you need to re-generate the missing transactions in VAT reporting documents follow-up (TCR042). This is a window in the Taxes area of ERPx.

Appendix F: Accounting Prediction Service

Introduction

General availability of the service is to be announced.

Accounting prediction service (APS) suggests invoice coding based on historical data. This will speed up the invoice registration process and reduce considerable the manual work and the amount of people involve in the workflow process

The U4 Accounting Prediction Service is focused on automating the prediction of new invoices through AI prediction and machine learning for supplier invoices, which are sent as part of the initial training based on historical transactions.

Partner used

The service is powered by our partner Kaunt.

- Kaunt model is trained within 24 hours after initial data set received
- 6 months of invoice data will provide a great start for the service
- Max 30 000 Invoices in one Export job

Appendix G: Invoice Data Capture (IDC)

Introduction

The Invoice Data Capture (IDC) Service utilises a third-party tech through Microsoft to leverage powerful Optical Character Recognition (OCR) capabilities to analyse and extract key fields and line items from invoices, enabling rapid invoice registration.

IDC uses **Artificial Intelligence (AI)** to accurately **extract key invoice data** and streamline the Account Payable process by **automatically registering invoices** to save time and reduce manual errors.

Schedule A: Glossary and Technical Acronyms

Unless defined in the tables below, capitalised words and phrases have the meaning given to them in Unit4's General Terms of Business or Unit4 Support Terms (found on www.unit4.com/terms).

Glossary

Term	Definition
Account Administrator	An appropriate and qualified Business User who will have administrative level control for creation, maintenance and deletion of Accounts providing access to the Unit4 Product.
Cloud Customer ID code	A unique Cloud Customer identifier.
ERPx Service User	Data Base User used for communication between Microservices.
ERPx Web Application	The main web application portal for Unit4 Platform Services solution.
Extension	Automated workflow built using Extension Kit.
Extension Flow	Automated workflow that connects applications and Services together. Each Extension Flow consists of a trigger and one or more actions.
Extension Kit	Unit4 Extension Kit is a cloud based, Multi-Tenant solution operated by Unit4 that provides a toolkit allowing Users to extend the capabilities of Unit4 products and integrate with other systems.
Feature Service	Features or solutions delivered as independently deployed and updated Services.

Term	Definition
IDP	An identity provider (IDP) is a service that stores and manages digital identities.
IDS System User	Data Base User used for an early access enablement.
Instance	Physical Service infrastructure and software running on it, deployed in a specific region.
Integration	Inbound or outbound data exchange built and managed with Integration Kit.
Localisation Services	Localisations delivered as Feature Services, developed for our key strategic territories and verticals, securing legal, statutory and market standard requirements.
Multi-Tenant	Architectural design of Unit4 Platform Services solution, housing multiple Tenants, where Tenants are physically integrated, but logically separated.
Platform Service	The Platform Service is a set of core Services that underpins the application providing services such as identity, integration, data management and AI foundation.
Record	A data record stored within a Customer's database (for example a line in a timesheet).
Sendgrid Services	A Third Party Service provider that Unit4 by default uses to send emails from ERPx system. Sendgrid Services can be replaced by the Customer's SMTP configuration, on demand.
Task focused Applications (aka Task Focused Apps)	Applications delivered as Feature Services focused on accomplishing one or a set of concrete tasks.
Tenants	Customer logically separated spaces designed to fulfil Customer business needs via the ERPx capabilities.
Transaction	The creation or modification of a Record.

Technical Acronyms

Acronym	Full Name
ADFS	Active Directory Federation Services
AES	Advanced Encryption Standard
API	Application Program Interface (e.g., Web Services)
ERP	Enterprise Resource Planning
FTE	Full Time Equivalent
HTTPS	Hypertext Transfer Protocol Secure
IDP	Identity Provider
Kbps	Kilobits Per Second
NPE	Non-Production Environment
PE	Production Environment
SHA-2 RSA	Secure Hash Algorithm (number 2) and RSA encryption Algorithm
SLA	Service Level Agreement
SOC	Service Organization Controls
TDE	Transparent Data Encryption
TLS	Transport Layer Security Encryption
URL	Uniform Resource Locator (a web address)
WIP	Work In Progress

Notable Changes from 2025Q1

1. Refresh of data for Resource Request will be released later (removed from here).
2. Added Intelligent Data Capture as new Feature Service